

## CLAIMS

1. A method of providing patient medical financial information through  
5 a networked connection comprising:  
receiving a patient medical financial information at an aggregate  
medical server;  
receiving patient access instructions at the aggregate medical  
server;  
10 receiving an access request from a requestor at the aggregate  
medical server;  
determining whether the access request corresponds with the  
patient access instructions;  
formatting the patient medical financial information into a requestor  
15 readable data format; and  
sending a portion of the formatted patient medical financial  
information to the requestor based on the patient access instructions and the  
access request, if the patient access instructions correspond with the patient  
access request.  
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2. The method of claim 1 further comprising:  
sending the medical financial information to an insurance server;  
receiving modified medical financial information from the insurance  
server at the aggregate medical server; and  
25 formatting the modified medical financial information.

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3. The method of claim 2 wherein the modified medical financial information comprises members selected from a group consisting of:

an insurance payment, a patient co-payment, portions of a patient medical charge, an allowed medical charge, a discount applied and the amount due by a patient of the patient medical charge.

4. The method of claim 1 wherein the requestor is selected from a group consisting of a patient and a third party authorized by the patient to request patient medical financial information.

5. The method of claim 1 wherein the requestor readable data format comprises a patient readable format.

6. The method of claim 5 wherein the patient readable format comprises a PC based home financial program from a group consisting of Quicken®, TurboTax®, MS Money®, Peachtree Accounting® and QuickBooks®.

7. The method of claim 1 further comprising:  
an agent in communication with the aggregate medical server, wherein the agent software is capable of providing tax related information based on patient medical financial information received at the agent.

8. The method of claim 7 wherein the agent resides at a patient PC.

9. The method of claim 7 wherein the agent resides on the medical aggregate server.

10. The method of claim 1 further comprising:  
providing a hyperlink to the aggregate server wherein the hyperlink  
comprises the access request.

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11. The method of claim 10 wherein the hyperlink is provided on a web  
site for access by the requestor.

12. The method of claim 1 wherein determining whether the access  
request corresponds with the patient access instructions further comprises  
implementing at least one security feature.

13. The method of claim 12 wherein the security feature is selected  
from a group consisting of a user password, a public key cryptograph, a digital  
signature, and an XML based security standard.

14. The method of claim 1 further comprising:  
verifying a portion of the patient medical financial information with  
an outside server.

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15. The method of claim 14 wherein verifying the portion of the patient  
medical financial information comprises determining a patient eligibility.

16. The method of claim 1 further comprising:  
updating the patient medical financial information.

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17. The method of claim 1 wherein the patient medical financial  
information is selected from a group consisting of a name, a social security  
number, a plan number, personal information, medical history information,  
medical claims information, prescription information, insurance company  
information, billing information, and health provider information.

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18. The method of claim 1 wherein the access information comprises level authorization information.

5 19. A computer usable medium including a program for controlling access to patient medical financial information through a networked connection comprising:

computer readable program code for receiving a patient medical financial information at an aggregate medical server;

10 computer readable program code for receiving patient access instructions at the aggregate medical server;

computer readable program code for receiving an access request from a requestor at the aggregate medical server;

15 computer readable program code for determining whether the access request corresponds with the patient access instructions;

computer readable program code for formatting the patient medical financial information into a requestor readable data format; and

20 computer readable program code for sending a portion of the patient medical financial information to the requestor based on the patient access instructions and the access request if the patient access instructions corresponds with the access request.

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20. The computer usable medium of claim 19 further comprising:  
computer readable code for sending the medical financial  
information to an insurance server;

5 computer readable code for receiving modified medical financial  
information from the insurance server; and  
computer readable code for formatting the modified medical  
financial information.

10 21. The computer usable medium of claim 20 wherein the medical  
financial data comprises selected members of a group consisting of a payment,  
a patient co-payment portions of a patient medical charge, an allowed medical  
charge, a discount applied and an amount due by a patient of the patient medical  
charge.

15 22. The computer usable medium of claim 21 wherein the requestor  
readable data format comprises a patient readable format.

20 23. The computer usable medium of claim 19 wherein the patient  
readable format comprises a PC based home financial program from a group  
consisting of Quicken®, TurboTax®, MS Money®, Peachtree Accounting® and  
QuickBooks®.

25 24. The computer usable medium of claim 19 further comprising:  
computer readable code for consolidating patient financial  
information at an agent software.

30 25. The computer usable medium of claim 24 wherein the agent  
software calculates a tax credit based on the patient medical financial  
information.

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26. The computer usable medium of claim 19 further comprising:  
computer readable code for providing a hyperlink to the aggregate  
server wherein the hyperlink comprises the access request.

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27. The computer usable medium of claim 26 wherein the hyperlink is  
provided on a web site for access by the requestor.

28. The computer usable medium of claim 19 wherein the computer  
10 readable code for determining whether the access request corresponds with the  
patient access instructions comprises computer readable code for implementing  
security features.

29. The computer usable medium of claim 28 wherein the security  
15 feature is selected from a group consisting of a user password, a public key  
cryptograph, a digital signature, and an XML based security standard.

30. The computer usable medium of claim 19 further comprising:  
computer readable code for verifying a portion of the patient  
20 medical financial information with an outside server.

31. The computer usable medium of claim 30 wherein the computer  
readable code for verifying the portion of the patient medical financial information  
comprises:  
25 computer readable code for determining a patient's eligibility.

32. The computer usable medium of claim 19 further comprising:  
computer readable code for updating the patient medical financial  
information.

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33. The computer usable medium of claim 19 wherein the patient medical financial information is selected from a group consisting of a name, a social security number, a plan number, personal information, medical history  
5 information, medical claims information, prescription information, insurance company information, billing information, and health provider information.

34. The computer usable medium of claim 19 wherein the access information comprises level authorization information.  
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35. A system to provide patient medical financial information through a networked connection comprising:

means for receiving a patient medical financial information at an aggregate medical server;  
15 means for receiving patient access instructions at the aggregate medical server;  
means for receiving a request from a requestor at the aggregate medical server;  
means for determining whether the access request corresponds  
20 with the patient access instructions;  
means for formatting the patient medical financial information into a requestor readable data format; and  
means for sending a portion of the patient medical financial information to the requestor based on the access instructions and the access  
25 request if the patient access instructions corresponds with the access request.

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